

## Future of Work: Local Area Homeworking Rates 1991 to 2030



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An Evidence-Based Insight from SGA Limited

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Area	2011 Census Rate	Pre-Pandemic Rate Estimate	2021 Census Rate	2024 to 2030 Lowest Estimate	2024 to 2030 High Estimate
England	9%	14%	32%	28%	35%
Wales	10%	14%	26%	25%	29%
England and Wales	9%	14%	31%	30%	34%
Darlington	8%	12%	24%	23%	28%
County Durham	8%	13%	24%	23%	27%
Hartlepool	7%	10%	17%	16%	21%
Middlesbrough	6%	9%	17%	16%	20%
Northumberland	11%	16%	27%	26%	31%
Redcar and Cleveland	7%	11%	18%	17%	21%
Stockton-on-Tees	7%	11%	22%	21%	25%
Gateshead	7%	11%	27%	26%	30%
Newcastle upon Tyne	7%	11%	30%	29%	34%
North Tyneside	7%	11%	32%	30%	35%
South Tyneside	6%	10%	24%	23%	27%
Sunderland	6%	10%	23%	22%	27%
Blackburn with Darwen	8%	11%	19%	18%	23%
Blackpool	10%	13%	20%	19%	24%
Cheshire East	11%	17%	35%	34%	38%
Cheshire West and Chester	9%	15%	31%	30%	35%
Halton	6%	10%	25%	24%	28%
Warrington	8%	13%	32%	31%	35%
Cumbria	12%	17%	24%	23%	27%
Bolton	8%	12%	24%	22%	27%
Bury	8%	12%	30%	29%	33%
Manchester	7%	11%	32%	30%	35%
Oldham	8%	11%	21%	20%	25%
Rochdale	8%	11%	21%	20%	25%
Salford	7%	11%	31%	30%	34%
Stockport	9%	14%	36%	35%	39%
Tameside	8%	11%	25%	24%	28%
Trafford	9%	14%	41%	40%	44%
Wigan	7%	11%	22%	21%	26%
Lancashire	9%	14%	25%	24%	28%
Knowsley	5%	9%	21%	20%	25%
Liverpool	6%	10%	26%	25%	30%
Sefton	8%	12%	28%	27%	31%
St. Helens	7%	10%	23%	22%	26%
Wirral	7%	12%	27%	26%	30%
East Riding of Yorkshire	10%	16%	25%	24%	28%
Kingston upon Hull, City of	5%	8%	13%	12%	16%
North East Lincolnshire	7%	10%	14%	13%	17%
North Lincolnshire	8%	12%	17%	16%	21%
York	8%	13%	36%	34%	39%
North Yorkshire	14%	20%	30%	29%	33%
Barnsley	7%	11%	20%	19%	23%

Area	2011 Census Rate	Pre-Pandemic Rate Estimate	2021 Census Rate	2024 to 2030 Lowest Estimate	2024 to 2030 High Estimate
Doncaster	8%	12%	19%	17%	22%
Rotherham	7%	11%	21%	20%	24%
Sheffield	7%	11%	29%	28%	32%
Bradford	8%	12%	25%	24%	28%
Calderdale	9%	14%	29%	28%	32%
Kirklees	8%	13%	26%	25%	30%
Leeds	7%	12%	34%	33%	37%
Wakefield	7%	11%	22%	21%	26%
Derby	7%	10%	23%	22%	27%
Leicester	8%	10%	19%	18%	22%
Nottingham	7%	10%	26%	24%	29%
Rutland	13%	21%	34%	33%	37%
Derbyshire	9%	14%	26%	25%	29%
Leicestershire	10%	15%	30%	29%	34%
Lincolnshire	11%	16%	22%	21%	26%
Nottinghamshire	9%	14%	27%	26%	30%
North Northamptonshire	8%	12%	24%	23%	27%
West Northamptonshire	12%	18%	29%	28%	32%
Herefordshire, County of	15%	21%	26%	25%	29%
Shropshire	13%	7%	27%	26%	30%
Stoke-on-Trent	7%	10%	15%	14%	18%
Telford and Wrekin	8%	12%	24%	23%	27%
Staffordshire	10%	14%	25%	24%	28%
Warwickshire	10%	15%	34%	33%	37%
Birmingham	7%	11%	26%	25%	29%
Coventry	7%	11%	26%	25%	29%
Dudley	7%	11%	22%	21%	25%
Sandwell	7%	9%	19%	18%	22%
Solihull	9%	14%	36%	35%	39%
Walsall	8%	11%	19%	18%	22%
Wolverhampton	7%	10%	19%	18%	22%
Worcestershire	10%	16%	29%	28%	32%
Bedford	9%	14%	31%	30%	35%
Central Bedfordshire	10%	15%	35%	34%	38%
Luton	7%	10%	21%	20%	25%
Peterborough	8%	12%	25%	23%	28%
Southend-on-Sea	8%	13%	33%	32%	37%
Thurrock	7%	11%	25%	24%	28%
Cambridgeshire	10%	16%	37%	36%	41%
Essex	9%	15%	32%	31%	35%
Hertfordshire	9%	15%	39%	38%	42%
Norfolk	10%	15%	25%	24%	29%
Suffolk	10%	16%	26%	25%	30%
Camden	11%	18%	57%	56%	60%
City of London	10%	5%	67%	66%	70%
Hackney	9%	15%	50%	49%	53%
Hammersmith and Fulham	9%	15%	52%	51%	55%

Area	2011 Census Rate	Pre-Pandemic Rate Estimate	2021 Census Rate	2024 to 2030 Lowest Estimate	2024 to 2030 High Estimate
Haringey	9%	14%	42%	41%	45%
Islington	8%	14%	56%	55%	59%
Kensington and Chelsea	14%	23%	58%	57%	60%
Lambeth	8%	13%	50%	49%	53%
Lewisham	7%	13%	45%	44%	48%
Newham	8%	11%	29%	28%	32%
Southwark	8%	13%	48%	47%	52%
Tower Hamlets	8%	12%	50%	49%	54%
Wandsworth	8%	14%	57%	56%	60%
Westminster	11%	20%	56%	55%	59%
Barking and Dagenham	6%	10%	21%	20%	24%
Barnet	11%	17%	43%	42%	46%
Bexley	7%	12%	34%	33%	38%
Brent	9%	9%	30%	29%	33%
Bromley	9%	15%	47%	46%	50%
Croydon	9%	13%	37%	36%	41%
Ealing	9%	13%	36%	35%	39%
Enfield	8%	13%	31%	30%	35%
Greenwich	7%	13%	41%	40%	44%
Harrow	10%	15%	36%	35%	39%
Havering	7%	12%	33%	32%	36%
Hillingdon	8%	13%	32%	31%	35%
Hounslow	8%	13%	32%	31%	36%
Kingston upon Thames	9%	15%	47%	46%	50%
Merton	8%	14%	43%	42%	46%
Redbridge	8%	13%	35%	34%	38%
Richmond upon Thames	11%	19%	59%	58%	62%
Sutton	8%	13%	36%	35%	40%
Waltham Forest	7%	12%	38%	37%	41%
Bracknell Forest	9%	15%	40%	39%	43%
Brighton and Hove	9%	17%	43%	42%	46%
Isle of Wight	11%	16%	22%	21%	26%
Medway	8%	12%	26%	25%	29%
Milton Keynes	9%	14%	36%	35%	40%
Portsmouth	7%	11%	25%	24%	28%
Reading	7%	13%	39%	38%	43%
Slough	7%	11%	27%	26%	30%
Southampton	7%	10%	26%	24%	29%
West Berkshire	11%	18%	41%	40%	44%
Windsor and Maidenhead	11%	19%	48%	47%	51%
Wokingham	11%	18%	51%	50%	54%
Buckinghamshire	12%	19%	41%	40%	44%
East Sussex	12%	18%	31%	30%	34%
Hampshire	10%	16%	35%	34%	38%
Kent	10%	15%	31%	30%	34%
Oxfordshire	10%	17%	38%	37%	41%
Surrey	11%	18%	44%	43%	47%

Area	2011 Census Rate	Pre-Pandemic Rate Estimate	2021 Census Rate	2024 to 2030 Lowest Estimate	2024 to 2030 High Estimate
West Sussex	10%	17%	33%	32%	36%
Bath and North East Somerset	10%	17%	39%	37%	42%
Bristol, City of	7%	13%	39%	37%	42%
Cornwall	14%	20%	25%	24%	28%
Isles of Scilly	23%	3%	29%	28%	32%
North Somerset	11%	16%	33%	32%	36%
Plymouth	7%	10%	21%	20%	25%
Bournemouth, C'church, Poole	9%	32%	30%	29%	33%
South Gloucestershire	9%	14%	35%	34%	39%
Swindon	7%	12%	31%	30%	34%
Torbay	11%	16%	21%	20%	24%
Wiltshire	11%	18%	34%	33%	37%
Devon	14%	20%	29%	28%	32%
Dorset	12%	18%	28%	27%	31%
Gloucestershire	11%	17%	33%	31%	36%
Somerset	12%	18%	26%	25%	29%
Isle of Anglesey	12%	17%	23%	21%	26%
Gwynedd	15%	20%	24%	23%	27%
Conwy	13%	17%	23%	22%	27%
Denbighshire	12%	16%	21%	20%	25%
Flintshire	8%	13%	22%	21%	25%
Wrexham	8%	12%	18%	17%	21%
Powys	20%	27%	30%	29%	33%
Ceredigion	20%	25%	32%	31%	35%
Pembrokeshire	16%	22%	23%	22%	26%
Carmarthenshire	14%	18%	23%	22%	27%
Swansea	8%	11%	25%	24%	29%
Neath Port Talbot	7%	10%	21%	20%	25%
Bridgend	7%	12%	22%	21%	26%
Vale of Glamorgan	8%	14%	34%	33%	38%
Cardiff	7%	11%	36%	35%	40%
Rhondda Cynon Taff	6%	10%	22%	21%	25%
Merthyr Tydfil	6%	10%	18%	17%	22%
Caerphilly	7%	11%	24%	23%	27%
Blaenau Gwent	6%	9%	14%	13%	17%
Torfaen	6%	10%	22%	21%	26%
Monmouthshire	13%	20%	34%	33%	38%
Newport	7%	11%	28%	27%	31%

## **Key Notes, Trends, Sources, Landmarks, Assumptions**

1. The main source of base data for the analysis from 2021 to 2024 is the Census of Population from 1991 to 2021. However, the definition for 1991 is slightly different to all other data periods. In 1991 people were asked simply if they “worked at home”. From 2001 onwards people were asked if they “worked mainly at or from home”.
2. The source of the latest official figures for local homeworking are the 2021 Census of Population. "Census Day" was 21 March 2021 at a point where the UK was in the middle of the third lockdown. The COVID-19 pandemic mandate to work from home wherever possible commenced in March 2020 and ended in January 2022. During the pandemic people were advised to return to the office, "where safe", in July 2021. Up until this time work gatherings "were allowed", but only if necessary for work purposes. For these reasons the 2021 Census findings on homeworking and homeworking rates are generally regarded as an unreliable indicator of more recent trends since the end of the pandemic in early 2022.
3. To establish recent trends since the 2021 Census a 2022 to 2024 range of estimates has been produced based on ONS business survey data regarding business intentions on homeworking by sector from 2021 to 2023/24. Most sectors during these periods show a slight rise since the Census in businesses stating that they are “using or intending to use increased homeworking as a permanent business model going forward”. The only sectors showing declines on this indicator are *Administrative and support service activities, Arts, entertainment and recreation, Other service activities*. All other sectors have shown a rise in business intentions to use homeworking. Across all sectors business intentions to use homeworking have risen from 17% of businesses in 2021 to 20% in 2023/24 (though with large variations in the degree of positive disposition such as a 5% increase in *Wholesale and retail* to a 1% increase in *Manufacturing*).
4. Assumptions for 2011 to 2019 are based on UK trends by industry from the Labour Force Survey. All other data is Census of population 1991 to 2021.
5. A different scale is used for 1991 to 2001 and 2001 to 2011, both ten-year time periods, compared to 2011 onwards which are single year time periods.
6. The 1990s saw the rise of the internet, telecommunications (including mobile and telecommuting), telemarketing and call centres. 2000s and 2010s saw the rise of home / business / public WIFI and internet jobs such as digital marketing (including social media). 2020s sees rise of AI and its application to business and particularly IT and business services.
7. Business survey evidence on homeworking trends suggests that there has been a 'levelling-off' in homeworking rates since the end of 2023 / early 2024, with rates generally rising or falling only marginally from their 2024 position. This evidence is the basis of the forecasts from 2024 to 2030.
8. Due to the methodology employed to establish the 2022 to 2024 High and Lowest estimates it can be shown that the "Most Likely" scenario is the mid-range between the two scenarios, or higher. These are shown by the lightly shaded areas from 2024 onwards. The main methodological reason for this is that, in general, a 2:1 ratio is found between the numbers of businesses intending to use homeworking and the number of workers that will work from home (this ratio itself relates to the average employment size of all businesses across the UK economy). However, the High Estimate in this analysis has assumed that there is only a 1:1 relationship between businesses intending to use homeworking and workers actually working mainly at or from home. As a result, the reader is advised that the High Estimates could be viewed as the Most Likely scenario and that the Lowest Estimates are the least likely by a considerable margin.